



Content Management Software Commercial Price List

Effective June 19, 2000



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INTRODUCTION

This price book contains pricing and policies related to sales of APPLICATIONXTENDER, ERMXTENDER, COLDXTENDER, WEBXTENDER, WORKFLOWXTENDER and SCANXTENDER.

LICENSE LIMITATION

Licensing for the above products for the sale prices listed herein is limited to the sole and exclusive benefit and use of the ultimate End-User of the respective OTG product(s). These license rights may not be further assigned or sublicensed to any other party for any purpose whatsoever, including ASP leasing of the OTG product(s).

Please contact OTG Sales for information on OnlineStor.COM and OTG's ASP pricing model.

MAINTENANCE PLANS

OTG offers annual Maintenance Plans that include unlimited software support for OTG products, software patches, service releases and major upgrades. Two plans are available:

Plan Type	Coverage	Support Calls	Software Updates	Price
Standard Plan x-x-MS	6:00 A.M. EST to 8:30 P.M. EST Monday-Friday	Unlimited during coverage	Patches, Service Releases and Major Upgrades Included	19% of List
Premium Plan x-x-MP	24 X 7 (US Domestic)	Unlimited	Patches, Service Releases and Major Upgrades Included	25% of List

Maintenance is required with the initial purchase of any OTG product and must be maintained in order to receive upgrades. If Maintenance lapses for any period of time, the user is required to pay for any period of time that Maintenance had lapsed as part of purchasing the new Maintenance Plan. When a Maintenance Plan has lapsed for more than 1 year, the Maintenance price is increased to 28% for that period of time the Maintenance had lapsed. Please refer to the Pricing Examples section for additional information.

PER-INCIDENT SUPPORT

For users not on a Maintenance Plan, or for users requiring support outside the hours covered by the Maintenance Plan purchased, per-incident support is available. Per-incident support does not include patches, service releases or major upgrades.

Per-incident Rate Description	Rate
Users not on Maintenance Plan during the standard coverage hours (6:00 AM to 8:30 PM, Monday-Friday)	\$250
Users not on Premium Maintenance Plan during extended coverage hours (8:30 PM to 6:00 AM, Monday-Sunday)	\$500

ADDITIONAL OTG SERVICES

OTG Software offers many services to help facilitate the sales and installation of OTG Software products. These include the following:

- **Training** – OTG maintains training centers in the Eastern and Western regions of the United States. Check the OTG Web site (www.otg.com) for details on the training courses, course times, and pricing. On-site training is also available. Please contact OTG Sales for more information.
- **Installation Services** – OTG's Professional Services division can assist users with on-site installation and setup. Please contact OTG Sales for more information.
- **Professional Services** – OTG's Professional Services division can assist users with requirement analysis, systems analysis, custom implementations, programming, customized training and customized documentation. Please contact OTG Sales or the Professional Services division for more information.

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Windows® and Windows NT® are registered trademarks of Microsoft Corporation.

SERVER CONNECTION PRICING

SERVER CONNECTION LICENSES

APPLICATIONXTENDER, ERMXTENDER and WEBXTENDER server connection pricing is based on the total number of concurrent clients accessing each respective product. WORKFLOWXTENDER server connection pricing is based on named user licensing and a WORKFLOWXTENDER server connection license is required for each named user that accesses the product.

Different server connection licenses can be purchased for any listed OTG product. For example, 100 AX server connections and 10 ERMX server connections can be purchased. OTG Software also offers a bundled AX/ERMX product, at a reduced price, for those interested in managing both images/objects and COLD report and/or print stream derived files. However, when an AX/ERMX bundle is purchased, all server connections must be purchased as an AX/ERMX bundle and different licenses of AX and/or ERMX cannot be added to the bundle. Users wishing to purchase different server connection licenses for listed OTG products must install version 4.2 or later of the license server and respective products.

The standalone server connection license is based upon installation and use on a single workstation and may not be accessed simultaneously by multiple machines or used in a WEBXTENDER configuration. The APPLICATIONXTENDER standalone license includes OCR and Full-Text functionality. When upgrading to a network license, these options must be purchased in order to maintain the functionality. The ERMXTENDER and AX/ERMX Bundle standalone license includes 1 ERM Server. When upgrading to a network license, a minimum of 1 ERM Server must be purchased.

Server Connections	Application Xtender	ERM Xtender	AX/ERMX Bundle	Web Xtender	Workflow Xtender
	AX-xxSC-SW	ERMX-xxSC-SW	AXEB-xxSC-SW	WX-xxSC-SW	WFX-xxSC-SW
Standalone	\$2,999	\$2,999	\$4,499	-	-
3	\$7,999	\$5,999	\$10,499	-	-
5	\$12,999	\$9,999	\$17,499	\$10,999	-
10	\$21,999	\$16,999	\$29,499	\$18,999	\$7,999
25	\$37,999	\$28,999	\$50,499	\$28,999	\$18,999
50	\$59,999	\$44,999	\$78,499	\$38,999	\$36,999
75	\$74,999	\$56,999	\$98,499	\$48,999	\$52,999
100	\$94,999	\$71,999	\$125,499	\$61,999	\$66,999
150	\$134,999	\$101,999	\$177,499	\$87,999	\$97,999
200	\$169,999	\$127,999	\$223,499	\$110,999	\$129,999
201+	\$Call	\$Call	\$Call	\$Call	\$Call

Note: COLDXTENDER 4.x will be available until December 31, 2000. Users wishing to order COLDXTENDER should use the pricing provided for ERMXTENDER while changing the product code from ERMX-xx-xx to CX-xx-xx for CX-only purchases and AXEB-xx-xx to AXB-xx-xx for AX/CX bundle purchases. Please refer to the Upgrade Policies section for information on upgrading from COLDXTENDER to ERMXtender.

SERVER CONNECTION LICENSE UPGRADES

When upgrading to a published server connection license (25, 50, etc.), the upgrade price is based on the per server connection price of the new published server connection license. For example, the price to upgrade from 10 AX server connections to 25 AX server connections would be \$22,800 (plus maintenance) based on the per server connection price of \$1,520 (at the 25 AX SC level) and the addition of 15 AX server connections. Please refer to the Pricing Examples section for more information.

When upgrading to a non-published server connection license, the upgrade price is based on the additional server connection license being added. For example, the price to upgrade from 10 AX server connections to 15 AX server connections would be \$12,999 (plus maintenance) based on the addition of 5 AX server connections. Please refer to the Pricing Examples section for more information.

SERVER CONNECTION STANDARD MAINTENANCE

Server Connections	Application Xtender	ERM Xtender	AX/ERMX Bundle	Web Xtender	Workflow Xtender
	AX-xxSC-MS	ERMX-xxSC-MS	AXEB-xxSC-MS	WX-xxSC-MS	WFX-xxSC-MS
Standalone	\$570	\$570	\$855	-	-
3	\$1,520	\$1,140	\$1,995	-	-
5	\$2,470	\$1,900	\$3,325	\$2,090	-
10	\$4,180	\$3,230	\$5,605	\$3,610	\$1,520
25	\$7,220	\$5,510	\$9,595	\$5,510	\$3,610
50	\$11,400	\$8,550	\$14,915	\$7,410	\$7,030
75	\$14,250	\$10,830	\$18,715	\$9,310	\$10,070
100	\$18,050	\$13,680	\$23,845	\$11,780	\$12,730
150	\$25,650	\$19,380	\$33,725	\$16,720	\$18,620
200	\$32,300	\$24,320	\$42,465	\$21,090	\$24,700
201+	\$Call	\$Call	\$Call	\$Call	\$Call

APPLICATIONXTENDER COMPONENT PRICING

OCR AND FULL-TEXT

APPLICATIONXTENDER offers software options for OCR and Full-Text search and retrieval. Full-Text processing provides indexing and retrieval of full text documents using keyword, proximity, phrase and Boolean search capabilities. APPLICATIONXTENDER and WEBXTENDER clients will have access to Full-Text Client licenses that are purchased for use with a network license.

Standalone licenses include Full-Text and OCR functionality. However, when upgrading to a network license, the Full-Text Server w/ Full-Text Clients and/or the OCR Network options must be purchased if this functionality is required.

Description	Product Code	Price	Standard Maintenance Product Code	Standard Maintenance Price
Full-Text Server	AX-FTXS-SW	\$2,999	AX-FTXN-MS	\$570
Full-Text Client	AX-FTXC-SW	\$199	AX-FTXC-MS	\$38
OCR Network	AX-OCRN-SW	\$1,999	AX-OCRN-MS	\$380

SCANXTENDER AND SCANXTENDER PRO

A single license of ScanXtender is included with the purchase of an APPLICATIONXTENDER network license (not included with a standalone purchase). SCANXTENDER license(s) are required for each additional workstation running SCANXTENDER.

Description	Qty	Product Code	Price	Standard Maintenance Product Code	Standard Maintenance Price
ScanXtender	1	SX-SCAN-SW	\$499	SX-SCAN-MS	\$95
ScanXtender Pro	1	SX-1SS-SW	\$5,999	SX-1SS-MS	\$1,140
ScanXtender Pro	3	SX-3SS-SW	\$14,389	SX-3SS-MS	\$2,734
ScanXtender Pro	10	SX-10SS-SW	\$41,959	SX-10SS-MS	\$7,972
ScanXtender Pro Index	1	SX-1IS-SW	\$2,499	SX-1IS-MS	\$475
ScanXtender Pro Index	3	SX-3IS-SW	\$7,049	SX-3IS-MS	\$1,339
ScanXtender Pro Index	10	SX-10IS-SW	\$22,999	SX-10IS-MS	\$4,370

ISIS Runtime Licenses

The ISIS PixTools runtime license is required for any seat that uses an ISIS supported scanner with APPLICATIONXTENDER and/or SCANXTENDER. The runtime license is a usage license for the ISIS technology, not an ISIS driver license. An ISIS runtime license for one scan station is included with the purchase of APPLICATIONXTENDER. A runtime license should be purchased for each additional APPLICATIONXTENDER scan station or any SCANXTENDER station using ISIS.

Description	Product Code	Price	Standard Maintenance Product Code	Standard Maintenance Price
ISIS Runtime License	AX-ISRT-SW	\$59	AX-ISRT-MS	\$11

ISIS SCANNER DRIVERS

ISIS scanner drivers can be purchased for an individual scanner. An ISIS scanner driver license is required only if the scanner manufacturer does not supply the ISIS scanner driver. There are multiple levels of ISIS scanner support. The support page at Pixel Translations' World Wide Web site (www.pixtran.com) lists each type of scanner supported by ISIS and the license level of each scanner. The following pricing applies to Level 1, Level 2, and Level 3 scanner drivers. Please call OTG for information on scanner drivers above these levels.

Description	Product Code	Price	Standard Maintenance Product Code	Standard Maintenance Price
Level 1-3 ISIS Scanner Driver	AX-ISDR-SW	\$119	AX-ISDR-MS	\$23

IMAGE PRINT SERVER

IMAGE PRINT SERVER is licensed based on server installation.

Description	Product Code	Price	Standard Maintenance Product Code	Standard Maintenance Price
Image Print Server	AX-IPS-SW	\$1,499	AX-IPS-SW-MS	\$285

APPLICATIONXTENDER SDK

The APPLICATIONXTENDER SDK is provided to authorized Partners and Resellers at no charge. End-Users are required to purchase the AX SDK and the AX SDK is licensed per End-User. Development support is available on a per-incident basis at the rate of \$500 per incident. Established discounts do not apply when purchasing the AX SDK.

Description	Product Code	Price
AX SDK	AX-SDK-SW	\$2,499

ERMXTENDER COMPONENT PRICING

ERM SERVER AND PRINT STREAM OPTIONS

The ERM Server processes ASCII and EBCDIC reports and is licensed on a per server basis. In addition to ASCII and EBCDIC reports, ERMXTENDER processes AFP, Metacode, PCL and PDF print streams. Users requiring print stream processing must purchase the appropriate option(s), in addition to the ERM Server, for each server that the print stream(s) will be processed from.

The ERM Server and print stream option pricing applies to ERMXTENDER and does not apply to COLDXTENDER 4.x. ERMXTENDER will be available in August 2000 and will replace CX 4.x as the standard shipping product.

Description	Product Code	Price	Standard Maintenance Product Code	Standard Maintenance Price
ERM Server	ERMX-SRVR-SW	\$4,999	ERMX-SRVR-MS	\$950
PDF Option	ERMX-PDF-SW	\$4,999	ERMX-PDF-SW	\$950
AFP Option	ERMX-AFP-SW	\$29,999	ERMX-AFP-MS	\$5,700
Metacode Option	ERMX-MET-SW	\$29,999	ERMX-MET-MS	\$5,700
PCL Option	ERMX-PCL-SW	\$29,999	ERMX-PCL-MS	\$5,700

In addition to product licensing for ERMXTENDER print stream options, services are required for print stream analysis, custom font mapping, extraction definition(s) and general installation. Please contact OTG Professional Services for more information on pricing and requirements.

WEBXTENDER COMPONENT PRICING

PUBLIC ACCESS LICENSES

Public Access Licenses are available for those installations that require external, read-only access to data via the WEBXTENDER thin client viewer technology. Public Access Licenses are based on the total number of concurrent clients that require access. Please refer to the Introduction section for information on license limitation.

Server Connections	Product Code	Price	Standard Maintenance Product Code	Standard Maintenance Price
100	WX-PAL1-SW	\$47,999	WX-PAL1-MS	\$9,120
250	WX-PAL2-SW	\$99,999	WX-PAL1-MS	\$19,000

WORKFLOWXTENDER COMPONENT PRICING

WORKFLOWXTENDER SERVER

The WORKFLOWXTENDER Server is licensed per installation. One WORKFLOWXTENDER Server is required per site.

Description	Product Code	Price	Standard Maintenance Product Code	Standard Maintenance Price
WFX Server	WFX-SRVR-SW	\$9,999	WFX-SRVR-SW-MS	\$1,900

WORKFLOWXTENDER PROCESS BUILDER

The WORKFLOWXTENDER Process builder is licensed per installation. One WORKFLOWXTENDER Process Builder is required per site.

Description	Product Code	Price	Standard Maintenance Product Code	Standard Maintenance Price
WFX Process Builder	WFX-PB-SW	\$4,999	WFX-PB-MS	\$950

In addition to product licensing for WORKFLOWXTENDER, services are required for workflow analysis and implementation. OTG also offers several WORKFLOWXTENDER reseller programs for those Partners that are interested in selling and/or installing WORKFLOWXTENDER systems. Please contact OTG Professional Services for more information on available programs and services.

STORAGE SUPPORT

All XTENDERSOLUTIONS products are capable of storing data to any file system available to the client workstation. However, the large amount of data managed by XTENDERSOLUTIONS generally requires alternative storage solutions such as Optical, Tape or DVD libraries. DISKXTENDER, a storage management solution offered by OTG, can be added to any XTENDERSOLUTIONS license, acting as the storage back-end. Please refer to the DISKXTENDER software price book for configuration and capacity details and a complete list of supported hardware devices and classifications.

CERTIFIED DATABASES

OTG certifies many databases to address a wide range of needs including low-end to high-end support. Please refer to the OTG Web site (www.otg.com) for a current list of supported databases.

QUICK START PACKAGES

Quick Start Packages are available to provide the services needed to implement XTENDERSOLUTIONS products quickly and efficiently.

Quick Start Packages include the following:

- Pre-installation conference call
- On-site kickoff meeting
- Product installation (up to 10 workstations where applicable)
- Admin and End-User training (where applicable)
- Wrap-up and signoff
- Two week follow-up

Description	Product Code	Price*
AX Quick Start	QS-AX-SRV	\$4,500
CX Quick Start	QS-CX-SRV	\$1,500
ERMX Quick Start	QA-ERMX-SRV	\$Call
WX Quick Start	QS-WX-SRV	\$1,500
AX/DX Quick Start	QS-AXDX-SRV	\$6,000
DX Quick Start	QS-DX-SRV	\$3,000

Note: Price does not include travel and expenses.

Please contact OTG Professional Services for more information on Quick Start Packages and other services available from OTG.

PRODUCT MANUALS

A single set of product manuals and/or PDF versions located on the product CD are shipped with every initial product purchase. Additional product manuals or sets can be purchased using the following ordering information.

Description	Order #	Cost
APPLICATIONXTENDER User Guide	AX-EU-DOC	\$30
APPLICATIONXTENDER System Guide	AX-SA-DOC	\$30
APPLICATIONXTENDER Install Guide	AX-IN-DOC	\$25
COLDXTENDER System Guide	CX-SG-DOC	\$25
ERMXTENDER System Guide	ERMX-SG-DOC	\$30
WEBXTENDER System Guide	WX-SG-DOC	\$30
WORKFLOWXTENDER System Guide	WFX-SG-DOC	\$25
WORKFLOWXTENDER Process Builder Guide	WFX-PB-DOC	\$30
WORKKFLOWXTENDER Basic Language Guide	WFX-BL-DOC	\$30

UPGRADE POLICIES

- Major upgrade pricing, previously documented in the 2-1-99 price list, still applies for any user that has not yet upgraded to APPLICATIONXTENDER 4.x or COLDXTENDER 4.x. After upgrading to APPLICATIONXTENDER 4.x or COLDXTENDER 4.x and purchasing the required Maintenance Plan, the new Maintenance Plan policies for support and upgrades will apply.
- In order to receive support and future major upgrades, as outlined in the new Maintenance Plan policy, users must have an active Maintenance Plan. Users that purchased products prior to the new Maintenance Plan policy must pay for any amount of time that Maintenance had lapsed while using the following rules:
 1. Any user that upgraded to APPLICATIONXTENDER 4.x or COLDXTENDER 4.x must have Maintenance from the date the upgrade was processed and shipped to the user.
 2. Any user that purchased a new APPLICATIONXTENDER 4.x, COLDXTENDER 4.x, WEBXTENDER 4.x or WORKFLOWXTENDER 4.x license must have Maintenance from 30 days following the date of product purchase.

Users that are required to pay for lapsed Maintenance are eligible to purchase Maintenance at 17% until December 31, 2000. After this date, the Maintenance price will be increased to 19% or 28% as outlined in the Maintenance Plan section of this price book.

- Any license that was purchased as a WEBXTENDER server with no server connections using 2-1-99 pricing will be converted to 5 WEBXTENDER server connections. All other licenses will retain the original server connection license purchased and will not include the 5 complimentary server connections that were offered with the WEBXTENDER server.
- There is no major upgrade fee when upgrading from COLDXTENDER 4.x to ERMXTENDER. However, users must purchase an ERM Server for each workstation that processes reports (and print stream processing options if this functionality is required). Please refer the ERMXTENDER Component pricing section for complete details on ERMX pricing.
- APPLICATIONXTENDER 3.x, COLDXTENDER 3.x AND WEBXTENDER 2.x will be supported until September 30, 2000.
- COLDXTENDER 4.x will be supported until June 30, 2002.

PRICING EXAMPLES

NEW SALES

Example 1: AX, ERMX Purchase

Scenario: User requires 50 concurrent licenses of AX, 5 concurrent licenses of ERMX, will be processing ASCII reports on 2 workstations, AFP print streams on 1 workstation and selects the Standard Maintenance Plan option.

Solution:	AX-50SC-SW	\$ 59,999
	AX-50SC-MS	\$ 11,400
	ERMX-5SC-SW	\$ 9,999
	ERMX-5SC-MS	\$ 1,900
	(2) ERMX-SRVR-SW	\$ 9,998
	(2) ERMX-SRVR-MS	\$ 1,900
	ERMX-AFP-SW	\$ 29,999
	ERMX-AFP-MS	<u>\$ 5,700</u>
		\$130,895*

Note: Price does not include required ERMX print stream option services.

Example 2: AX, CX Purchase

Scenario: User requires 50 concurrent licenses of AX, 5 concurrent licenses of CX and selects the Standard Maintenance Plan option.

Solution:	AX-50SC-SW	\$ 59,999
	AX-50SC-MS	\$ 11,400
	CX-5SC-SW	\$ 9,999
	CX-5SC-MS	<u>\$ 1,900</u>
		\$ 83,298

Example 3: AX w/ Full-Text and OCR Purchase

Scenario: User requires 50 concurrent licenses of AX, OCR and Full-Text for 10 clients and selects the Standard Maintenance Plan option.

Solution:	AX-50SC-SW	\$ 59,999
	AX-50SC-MS	\$ 11,400
	AX-FTXS-SW	\$ 2,999
	AX-FTXS-MS	\$ 570
	(10) AX-FTXC-SW	\$ 1,990
	(10) AX-FTXC-MS	\$ 380
	AX-OCRN-SW	\$ 1,999
	AX-OCRN-MS	<u>\$ 380</u>
		\$ 79,717

Example 4: AX, WX, SX Purchase

Scenario: User requires 50 concurrent licenses of AX, 10 concurrent licenses of WX, a Public Access License for 100 concurrent connections, will be batch scanning on 3 workstations and selects the Standard Maintenance Plan option.

Solution:	AX-50SC-SW	\$ 59,999
	AX-50SC-MS	\$ 11,400
	WX-10SC-SW	\$ 18,999
	WX-10SC-MS	\$ 3,610
	WX-PAL1-SW	\$ 47,999
	WX-PAL1-MS	\$ 9,120
	(2) SX-SCAN-SW	\$ 998
	(2) SX-SCAN-MS	\$ 190
	(2) AX-ISRT-SW	\$ 118
	(2) AX-ISRT-MS	<u>\$ 22</u>
		\$152,455

Note: 1 license of SX is included with a network purchase of AX so the user is only required to purchase 2 copies rather than 3. 1 ISIS runtime license is included with the purchase of AX so the user is only required to purchase 2 copies rather than 3.

Example 5: AX, WFX Purchase

Scenario: User requires 50 concurrent licenses of AX, 10 named licenses of WFX and selects the Standard Maintenance Plan option.

Solution:	AX-50SC-SW	\$ 59,999
	AX-50SC-MS	\$ 11,400
	WFX-10SC-SW	\$ 7,999
	WFX-10SC-MS	\$ 1,520
	WFX-SRVR-SW	\$ 9,999
	WFX-SRVR-MS	\$ 1,900
	WFX-PB-SW	\$ 4,999
	WFX-PB-MS	<u>\$ 950</u>
		\$ 98,766*

Note: Price does not include required WFX services.

Example 6: AX with Premium Maintenance Plan Purchase

Scenario: User requires 50 concurrent licenses of AX and selects the Premium Maintenance Plan option.

Solution:	AX-50SC-SW	\$ 59,999
	AX-50SC-MP	<u>\$ 15,000</u>
		\$ 74,999

Example 1: Upgrade AX Server Connections to Published Server Connection License

Scenario: User purchased 25 AX server connections on 1/1/00 and wants to upgrade to 50 AX server connections on 6/30/00. User has a Standard Maintenance Plan that expires on 3/1/01.

Solution: User is upgrading to a published server connection license so the upgrade price is based on the per server connection price of the new published server connection license. The following formula should be used for this upgrade:

$$([New\ SC\ License\ Price] / [SC\ Increment]) \times [Number\ of\ Additional\ SC]$$

or

$$\$59,999 / 50 = \$ 1,200$$

$$\$1,200 \times 25 = \$ 30,000$$

In addition, Maintenance must be purchased for the additional server connections and can be pro-rated to end on 3/1/01. The following formula should be used for pro-rating Maintenance to end based on an existing Standard Maintenance Plan:

$$(([Upgrade\ List\ Price] \times 19\%) / 12) \times [Number\ of\ Remaining\ Months\ on\ Original\ Plan]$$

or

$$\$30,000 \times 19\% = \$ 5,700$$

$$\$5,700 / 12 = \$ 475$$

$$\$475 \times 8 = \$ 3,800$$

AX-50SC-SW	\$ 30,000
AX-50SC-MS	<u>\$ 3,800</u>
	\$ 33,800

Example 2: Upgrade AX Server Connections to Non-Published Server Connection License

Scenario: User purchased 25 AX server connections on 1/1/00 and wants to upgrade to 30 AX server connections on 6/30/00. User has a Standard Maintenance Plan that expires on 3/1/01.

Solution: User is upgrading to a non-published server connection license so the upgrade price is based on the additional server connection license being added. In this example the user would purchase 5 AX server connections to bring the total server connections to 30.

AX-5SC-SW \$12,999

In addition, Maintenance must be purchased for the additional server connections and can be pro-rated to end on 3/1/01. The following formula should be used for pro-rating Maintenance to end based on an existing Standard Maintenance Plan:

$$(((\text{[Upgrade List Price]} \times 19\%) / 12) \times \text{[Number of Remaining Months on Original Plan]})$$

or

$$\$12,999 \times 19\% = \$ 2,470$$

$$\$2,470 / 12 = \$ 206$$

$$\$206 \times 8 = \$ 1,648$$

AX-5SC-SW \$ 12,999

AX-5SC-MS \$ 1,648

\$ 14,647

Example 3: Upgrade AX/ERMX Bundle from Standalone License to Network License

Scenario: User purchased an AX/ERMX Bundle standalone license on 1/1/00, wants to upgrade to 10 AX/ERMX Bundle server connections on 6/30/00, wants to maintain the OCR and Full-Text functionality for all clients and will be processing ASCII reports on 1 workstation. User has a Standard Maintenance Plan that expires on 3/1/01.

Solution: User is upgrading to a published server connection license so the upgrade price is based on the per server connection price of the new published server connection license. The following formula should be used for this upgrade:

$$([\text{New SC License Price}]/[\text{SC Increment}]) \times [\text{Number of Additional SC}]$$

or

$$\$29,499 / 10 = \$2,950, \$2,950 \times 9 = \$26,550$$

In addition to server connections, OCR Network, Full-Text Server, Full-Text Clients and 1 ERM Server must be purchased.

AX-OCRN-SW, AX-FTXS-SW, (10) AX-FTXC-SW and ERMX-SRVR-SW

In addition, Maintenance must be purchased for the additional server connections, OCR Network, Full-Text Server, Full-Text Clients and ERM Server and can be pro-rated to end on 3/1/01. The following formula should be used for pro-rating Maintenance to end based on an existing Standard Maintenance Plan:

$$(([\text{Upgrade List Price}] \times 19\%) / 12) \times [\text{Number of Remaining Months on Original Plan}]$$

or

$\$26,550 \times 19\% = \$5,045, \$5,045 / 12 = \$420, \$420 \times 8 = \$3,360$	Server Connections
$\$1,999 \times 19\% = \$380, \$380 / 12 = \$32, \$32 \times 8 = \256	OCR Network
$\$2,999 \times 19\% = \$570, \$570 / 12 = \$48, \$48 \times 8 = \384	Full-Text Server
$\$1,990 \times 19\% = \$378, \$378 / 12 = \$32, \$32 \times 8 = \256	Full-Text Clients
$\$4,999 \times 19\% = \$950, \$950 / 12 = \$79, \$79 \times 8 = \632	ERM Server

AXEB-10SC-SW	\$ 26,550
AXEB-10SC-MS	\$ 3,360
AX-OCRN-SW	\$ 1,999
AX-OCRN-MS	\$ 256
AX-FTXS-SW	\$ 2,999
AX-FTXS-MS	\$ 384
(10) AX-FTXC-SW	\$ 1,990
(10) AX-FTXC-MS	\$ 256
ERMX-SRVR-SW	\$ 4,999
ERMX-SRVR-MS	\$ 632
	\$ 43,425

LAPSED MAINTENANCE

Example 1: Purchasing Maintenance Plan after Maintenance has Lapsed for Less than 1 Year

Scenario: User purchased 25 AX server connections on 1/1/99 and a Standard Maintenance Plan that ended on 1/1/00. User wants to purchase a new Standard Maintenance Plan on 6/1/00.

Solution: Maintenance had lapsed for 5 months prior to the new Plan being purchased so the user must pay for the period of time that Maintenance had lapsed as part of purchasing the new Maintenance Plan. The following formula should be used for calculating the amount due for lapsed Maintenance if Maintenance has lapsed for less than 1 year:

$$(((\text{Product List Price}] \times 19\%) / 12) \times [\text{Number of Months Lapsed}]$$

or

$$\$37,999 \times 19\% = \$ 7,220$$

$$\$7,220 / 12 = \$ 602$$

$$\$602 \times 5 = \$ 3,010$$

$$\text{AX-25SC-MS} \quad \$ 7,220$$

$$\text{AX-25SC-MSB} \quad \$ 3,010$$

$$\underline{\$ 10,230}$$

Example 2: Purchasing Maintenance Plan after Maintenance has Lapsed for More than 1 Year

Scenario: User purchased 25 AX server connections on 1/1/99 and did not purchase Maintenance with the original order. User wants to purchase a Standard Maintenance Plan on 6/1/00.

Solution: Maintenance was not purchased with the original order (prior to the new Maintenance policy) so the user must pay for the period of time that the product was not covered under Maintenance from 30 days following the date of product purchase. The following formula should be used for calculating the amount due for lapsed Maintenance if Maintenance has lapsed for more than 1 year:

$$(((\text{Product List Price}] \times 28\%) / 12) \times ([\text{Number of Months Lapsed}] - 1)$$

or

$$\$37,999 \times 28\% = \$ 10,640$$

$$\$10,640 / 12 = \$ 887$$

$$\$887 \times 16 = \$ 14,192$$

$$\text{AX-25SC-MS} \quad \$ 7,220$$

$$\text{AX-25SC-MSB} \quad \$ 14,192$$

$$\underline{\$ 21,412}$$